Project Name: Economic Development Salesforce Enhancements (2021-22) Project ID: D12191SF

Leadership	Leadership Group: Finance/Admin										
Departmen	ı t: Economic [Development		Division: All	Division: All						
Project Spe	onsor: Laura	Dodd	Date Requ	ested: 2/15/22	PM Custom	er No. 191					
Request Ty	/pe: Ne	w Developmen	t x	Enhancement	Customer S	Support					
	Planned System Maintenance or Upgrade										
IT Team Na	ame: Infrastru	cture and GIS		IT Team No: 1							
Project Ma	nager/Leadeı	r: Susan Moore									
Account Number:	96785	Account Description:		dministration	Customer Name:	Economic Development					
Grant Fund	led?	Yes No x	(Mandate? Yes Mandate Source:	No x						

Project Goal

To enhance Economic Development's Salesforce instance with customizations, integrations, and other application development, so that user adoption is increased, and reporting metrics, intake process, and outreach can become more efficient and standardized.

Business Objective

Improve the tracking of Retention and Attraction activities/correspondences with companies and other key stakeholders.

Track data related to past, present and future events, attendees, contacts and communication where staff can quickly view customer engagement activities and utilize best practices for marketing communications.

Expand the use of Salesforce into other divisions and additional staff within Economic Development.

Major Deliverables

Examples include:

- Enhance Salesforce Lightning UI
 - Form Page Design and Layout Enhancements
 - Field level drop down box standardization
 - Data Standardization & Classification Reviews
 - Report Cleanup
 - Dashboard Optimization & Report Creation based on Key Performance Indicators and other related metrics

Project Name: Economic Development Salesforce Enhancements (2021-22) Project ID: D12191SF

- Replace the Salesforce to Outlook Connector
- Review, test, and activate Salesforce functionality releases
- Replace current data backup utility with a more robust & efficient solution
- Create a full sandbox environment to test data loads and for users to test new functionality
- Research, develop and implement Salesforce Campaigns and applicable integrations

Approach

- Review current business process and conduct needs assessment with customer, ensuring current manual processes are refined and automated.
- Document system requirements
- Determine and document system architecture and diagram
- Assess User Hardware and Software Requirements
- Conduct Tech Review
- Order software if needed
- Develop Implementation Plan
- Develop new functionality
- Develop User Acceptance Test Plan
- Test new functionality
- Acquire User Acceptance Sign off
- Conduct Change Control
- Develop User Documentation, Service Center Knowledge Documents
- Train users on new system
- Release new functionality into production

Research & Analysis

Gartner Research Recommendation

Gartner's *Vendor Rating: Salesforce* document (updated July 2021) contained multiple recommendations related to Salesforce. First, it emphasized that as Salesforce continues to expand its offerings with both internal development and additional acquisitions, it is critical "to invest in dedicated Salesforce skill sets and resources to derive maximum value from its products." (p. 6). A portion of the hours on this project will be spent by IT staff investing time to understand the latest product advancements and upcoming product retirements to ensure the Econ Dev staff is getting the most use out of their licensing.

In addition, the County will be exploring multiple integrations with our Salesforce environment. Gartner cautions that historically, there have been "inconsistent capabilities among third-party

Project Name: Economic Development Salesforce Enhancements (2021-22) Project ID: D12191SF

Salesforce service providers, and a lack of deep industry-specific process skills. This leads to troubled implementations and loss of agility in terms of deployment speed" (p. 9). While Gartner also mentions that the updated Partner Program could help with this issue, knowing there are potential concerns, the County needs to thoroughly vet any potential integrations from previously unknown vendors.

Benefits

See Return on Investment (ROI) Analysis Document

Impact

Number of Users 30

Divisions All of Economic Development

Leadership Groups Finance/Admin

<u>Risk</u>

Business Environment Medium - Project will require some changes to existing business

processes.

Technical Environment Medium - Previously implemented technologies with new aspects

and/or new requirements.

<u>Assumptions</u>

Staffing IT Staffing: resources will be available for the hours indicated per the attached

project plan.

Other Staffing: additional staffing will be available as follows:

Role: Name Hours per Day

Project Sponsor: Laura Dodd As needed

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Project Name: Economic Development Salesforce Enhancements (2021-22) Project ID: D12191SF

Facilities
•
Technical
•
•
Funding
Information Technology
Other
• If any 3rd party tools require a purchase, Economic Development will provide funding.
Priority
<u>Constraints</u>
•
•
<u>Exclusions</u>
•
•

Project Name: Economic Development Salesforce Enhancements (2021-22) Project ID: D12191SF

PROJECT PHASE AUTHORIZATION

Phase(s): All		
Total Estimated Application Services	Hours: 720	
Total Estimated Technical Systems	Hours: 30	
Total Estimated CLEMIS	Hours:	
Total Estimated Internal Services	Hours:	
IT Application Services Division Manager Approval:	Date:	
IT Technical Systems Division Manager Approval:	Date:	
IT CLEMIS Division Manager Approval:		Date:
IT Internal Services Division Manager Approval:		Date:
IT Management Approval:		
Approved: Yes	No	Date:
Reason:		
Project Sponsor Approval:		
Title:		Date:

PROJECT SUMMARY

Authorized Development (see above)	Hours: 750	
Previously Authorized Development	Hours:	
Preliminary Estimated Development for Future Phases	Hours:	
Grand Total Estimated Development	Hours: 750	Cost: \$122,225

Project Name: Economic Development Salesforce Enhancements (2021-22) Project ID: D12191SF

PROJECT COMPLETION AUTHORIZATION

Customer Acceptance of Product:							
Title:	Date:						
Project Office Review:	Date:						

Economic Development Salesforce Enhancements (2021-22) - Size Estimate (+/- 10% to 50%)

1	Туре	ID T	Task Name	Estimated
2				Hours
3	3	000000	ED Salesforce Enhancements 2021-22	750
4				750

Return on Investment Analysis

Project Summary

Description	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Total
Benefits/Savings:							
Tangible Benefits Subtotal:	1,316	1,316	1,316	1,316	1,316	1,316	7,896
Cost Avoidance Subtotal:	40,306	40,705	41,109	41,520	41,937	42,360	247,936
Costs:							
Development Services Subtotal:	122,225	25,121	25,498	25,881	26,269	26,663	251,656
Hardware Subtotal:	0	0	0	0	0	0	0
Software Subtotal:	1,549	1,549	1,549	1,549	1,549	1,549	9,291
Infrastructure Subtotal	0	0	0	0	0	0	0
Training Subtotal:	0	0	0	0	0	0	0
Other Subtotal:	0	0	0	0	0	0	0
Annual Statistics:							
Annual Total Savings	41,622	42,021	42,425	42,836	43,253	43,676	255,832
Annual Total Costs	123,774	26,670	27,047	27,429	27,817	28,211	260,947
Annual Return on Investment	(82,152)	15,351	15,379	15,407	15,435	15,464	(5,116)
Annual Costs/Savings Ratio	297.38%	63.47%	63.75%	64.03%	64.31%	64.59%	(0, 0)
Project Cumulative Statistics:							
Cumulative Total Savings	41,622	83,643	126,068	168,903	212,156	255,832	255,832
Cumulative Total Costs	123,774	150,443	177,490	204,919	232,736	260,947	260,947
Cumulative Return on Investment	(82,152)	(66,801)	(51,422)	(36,015)	(20,580)	(5,116)	(5,116)
Cumulative Cost/Savings Ratio	297.38%	179.86%	140.79%	121.32%	109.70%	102.00%	102.00%
Year Positive Payback Achieved							NO PAYBACK
State or Federal Mandate?							NOTATIBATION
Signatures:							
Benefits Reviewed By Project Sponsor				Date:			
Costs (including IT Resources) Reviewed By Information Technology Project Manager				Date:			

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Oakland County -- Economic Development Salesforce Enhancements (2021-22) Return on Investment Analysis

Date: 02/02/2022

Savings Detail

Benefit/Savings Description	Project Savings Category	Budget Category/Funding Source	Unit Desc	Units	Rate per Unit	Total Savings	Annual Multiplier
Quickly view customer engagement							
activities and utilize best practices for							
marketing communications.	Intangible Benefit					0	
Replace Spanning Backup							
Environment with a more robust &							
efficient solution would save the cost of		IT/APP SERV CONTRACTED SERV					
Spanning licensing.	Tangible Benefit	(63600-1080201-152010-730373)	ANN	1	1,316	1,316	
Replacing the Spanning Backup Environment would prevent the County							
from purchasing an additional full		IT/APP SERV CONTRACTED SERV					
	Coot Avoidonos		ANINI	4	10 704	10 704	
sandbox for the QA Environment.	Cost Avoidance	(63600-1080201-152010-730373)	ANN	I	13,734	13,734	
Implement Campaigns within Salesforce and integrate with an event registration system to create effective tracking mechanisms as well as create efficient communications with clients via GovDelivery. (2 hours weekly x 52 weeks)	Cost Avoidance	Economic Development	ANN	104	73	7,592	1.015
Qualtrics survey integration will allow	OOST / WORdanie	Leonomic Bevelopment	7 (1 41 4	104	/ 5	1,002	1.013
for surveys to be sent to							
companies/contacts in Salesforce so							
that ED staff will have an							
understanding of client needs.	Intangible Benefit					0	
Salesforce Lightning UI, Workflow Data Standardization Enhancements will increase ED staff productivity and	Č						
assist with data reliability.	Intangible Benefit					0	

Return on Investment Analysis

Savings Detail

	Project Savings		Unit		Rate per		Annual
Benefit/Savings Description	Category	Budget Category/Funding Source	Desc	Units	Unit	Total Savings	Multiplier
Replace the soon to be retired							
Salesforce to Outlook Connector with							
another technology that is compatible							
with Salesforce and our existing Office							
365 environment which will create a							
more efficient user experience.	Intangible Benefit					0	
Increased Reporting Metrics	Intangible Benefit					0	
Expand user documentation for							
increased efficiency and training							
experiences. (Avg 5 hours weekly x 52							
weeks)	Cost Avoidance	Economic Development	ANN	260	73	18,980	1.015
						0	
						0	
						0	
						0	
						0	
						0	
						0	
						0	
						0	
						0	
						0	
						0	
						0	
						0	
						0	
						0	
						0	
						0	
						0	

Return on Investment Analysis

Savings Detail

		Affects Project ROI?							Potential Savings Extensions					
Benefit/Savings Description	Project Savings Category	Y1	Y2	Y3	Y	4 Y	ัร \	Y6	Y 1	Y2	Y 3	Y4	Y5	Y6
Quickly view customer engagement activities and utilize best practices for			-	-										
marketing communications.	Intangible Benefit					İ	i							
Replace Spanning Backup			İ	Ì	1	-								
Environment with a more robust &														
efficient solution would save the cost of														
Spanning licensing.	Tangible Benefit	x	х	х	х	х	x	、	1,316.00	1,316.00	1,316.00	1,316.00	1,316.00	1,316
Replacing the Spanning Backup			1	1	1	-								
Environment would prevent the County							-							
from purchasing an additional full						İ	i							
sandbox for the QA Environment.	Cost Avoidance	х	х	Х	Х	Х	х	(13,734.00	13,734.00	13,734.00	13,734.00	13,734.00	13,734
Implement Campaigns within Salesforce and integrate with an event registration system to create effective tracking mechanisms as well as create efficient communications with clients via GovDelivery. (2 hours weekly x 52 weeks) Qualtrics survey integration will allow for surveys to be sent to companies/contacts in Salesforce so	Cost Avoidance	x	х	x	x	x	×	ζ.	7,592.00	7,705.88	7,821.47	7,938.79	8,057.87	8,179
that ED staff will have an understanding of client needs.	Intangible Benefit													
Salesforce Lightning UI, Workflow Data Standardization Enhancements will increase ED staff productivity and assist with data reliability.	Intangible Benefit													

Return on Investment Analysis

Savings Detail

		Af	fect	s P	roje	ct F	ROI	?	Po	tential Savi	ngs Extensi	ons	
Benefit/Savings Description		Y1	Y2	Y3	Y	ı Y	5 Y	6 Y1	Y2	Y3	Y4	Y5	Y6
Replace the soon to be retired Salesforce to Outlook Connector with another technology that is compatible with Salesforce and our existing Office 365 environment which will create a more efficient user experience. Increased Reporting Metrics Expand user documentation for increased efficiency and training experiences. (Avg 5 hours weekly x 52 weeks)	Project Savings Category Intangible Benefit Intangible Benefit Cost Avoidance				X	x	x		19,264.70				20,447
			i ! !		ĺ						! ! !	! ! !	i I I

Return on Investment Analysis

Savings Summary

Benefit/Savings Description	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Total	
Tangible Benefit:								
Replace Spanning Backup Environment								
with a more robust & efficient solution would	1 216	1 216	1 216	1 216	1 216	1 216	7 006	
save the cost of Spanning licensing.	1,316	1,316	1,316	1,316	1,316	1,316	7,896	
Tangible Benefits Subtotal:	1,316	1,316	1,316	1,316	1,316	1,316	7,896	
Cost Avoidance:								
Implement Campaigns within Salesforce and integrate with an event registration system to create effective tracking mechanisms as well as create efficient communications with clients via								
GovDelivery. (2 hours weekly x 52 weeks)	7,592	7,706	7,821	7,939	8,058	8,179	47,295	
Expand user documentation for increased efficiency and training experiences. (Avg 5 hours weekly x 52 weeks)	18,980	19,265	19,554	19,847	20,145	20,447	118,237	
Replacing the Spanning Backup Environment would prevent the County from purchasing an additional full sandbox for the								
QA Environment.	13,734	13,734	13,734	13,734	13,734	13,734	82,404	
Cost Avoidance Subtotal:	40,306	40,705	41,109	41,520	41,937	42,360	247,936	
Intangible Benefit:								

Return on Investment Analysis

Savings Summary

Benefit/Savings Description	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Total
Quickly view customer engagement activities and utilize best practices for marketing communications.							
Qualtrics survey integration will allow for surveys to be sent to companies/contacts in Salesforce so that ED staff will have an understanding of client needs.							
Salesforce Lightning UI, Workflow Data Standardization Enhancements will increase ED staff productivity and assist with data reliability.							
Replace the soon to be retired Salesforce to Outlook Connector with another technology that is compatible with Salesforce and our existing Office 365 environment which will create a more efficient user experience. Increased Reporting Metrics							
Savings Total:	41,622	42,021	42,425	42,836	43,253	43,676	255,832

Return on Investment Analysis

Cost Detail

								Af	fect	s Pr	ojec	t RO	OI?
	Project Cost	Budget Category/Funding	Unit		Rate per		Annual						
Cost Description	Category	Source	Desc	Units	Unit	Total Cost	Multiplier	Y1	Y2	Y3	Y4	Y5	Y6
IT Hours - New Development	Development Svcs		HR	750	163	122,225		Х	<u> </u>				
IT Hours - System Maintenance	Development Svcs				165	0				1			
IT Hours - Customer Support	Development Svcs		HR	100	165	16,500	1.015		Х	х	х	х	х
IT Hours - Planned Maintenance	Development Svcs		HR	50	165	8,250	1.015		Х	Х	х	Х	х
User Hours - New Development	Development Svcs					0			İ				
User Hours - PTNE/OT	Development Svcs					0							
Contractor Professional Services	Development Svcs					0							
PC System - Acquisition	Hardware				687	0							
PC System - Maintenance	Hardware				2,936	0							
Notebook - Acquisition	Hardware				1,115	0							
Notebook - Maintenance	Hardware				3,024	0							
Tablet Notebook - Acquisition	Hardware				1,421	0							
Tablet Notebook - Maintenance	Hardware				2,800	0			ŀ				
Laserprinter - Acquisition	Hardware				1,432	0							
Laserprinter - Maintenance	Hardware				1,408	0							
PC Maintenance User Owned	Hardware				2,720	0			İ	1	Ī		
Printer Maintenance User Owned	Hardware				1,264	0							[
File Space (100GB)	Hardware		ANN		23	0				1			
Package Software - Acquisition													ĺ
(OwnBackup)	Software		EA	25	62	1,549		х	İ		1		
Package Software - Maintenance										1	Î		
(OwnBackup)	Software		EA	25	62	1,549			Х	х	x	x	x
Business Objects Access	Software					0							
Term Emulation SFTW-Acquisition	Software					0							[]
Term Emulation SFTW-Maintenance	Software					0							
Server - Acquisition/Upgrade	Infrastructure				8,000	0				1	ĺ		
Server - Maintenance	Infrastructure				360	0				1			
Server Sftwre - Acquisition/Upgrade	Infrastructure				335	0			!	1	1		
Server Sftwre - Maintenance	Infrastructure					0			İ	1	1		
Server Rack Mount	Infrastructure				400	0			İ	1	1		

Return on Investment Analysis

Cost Detail

		Potential Cost Extensions							
	Project Cost			<u> </u>					
Cost Description	Category	Y1	Y2	Y3	Y4	Y5	Y6		
IT Hours - New Development	Development Svcs	122,225.00							
IT Hours - System Maintenance	Development Svcs								
IT Hours - Customer Support	Development Svcs		16,747.50		17,253.69	17,512.50	17,775.19		
IT Hours - Planned Maintenance	Development Svcs		8,373.75	8,499.36	8,626.85	8,756.25	8,887.59		
User Hours - New Development	Development Svcs								
User Hours - PTNE/OT	Development Svcs								
Contractor Professional Services	Development Svcs								
PC System - Acquisition	Hardware								
PC System - Maintenance	Hardware								
Notebook - Acquisition	Hardware								
Notebook - Maintenance	Hardware								
Tablet Notebook - Acquisition	Hardware								
Tablet Notebook - Maintenance	Hardware								
Laserprinter - Acquisition	Hardware								
Laserprinter - Maintenance	Hardware								
PC Maintenance User Owned	Hardware								
Printer Maintenance User Owned	Hardware								
File Space (100GB)	Hardware								
Package Software - Acquisition									
(OwnBackup)	Software	1,548.50							
Package Software - Maintenance									
(OwnBackup)	Software		1,548.50	1,548.50	1,548.50	1,548.50	1,548.50		
Business Objects Access	Software								
Term Emulation SFTW-Acquisition	Software								
Term Emulation SFTW-Maintenance	Software								
Server - Acquisition/Upgrade	Infrastructure								
Server - Maintenance	Infrastructure								
Server Sftwre - Acquisition/Upgrade	Infrastructure								
Server Sftwre - Maintenance	Infrastructure								
Server Rack Mount	Infrastructure								

Return on Investment Analysis

Cost Summary

Cost Description	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Total
Development Services:						İ	
IT Hours - New Development	122,225						122,225
IT Hours - System Maintenance							
IT Hours - Customer Support		16,748	16,999	17,254	17,512	17,775	86,288
IT Hours - Planned Maintenance		8,374	8,499	8,627	8,756	8,888	43,144
User Hours - New Development							
User Hours - PTNE/OT							
Contractor Professional Services							
Development Services Subtotal:	122,225	25,121	25,498	25,881	26,269	26,663	251,656
Hardware:			,		,		,
Hardware Subtotal:							
Software:							
Package Software - Acquisition							
(OwnBackup)	1,549						1,549
Package Software - Maintenance							
(OwnBackup)		1,549	1,549	1,549	1,549	1,549	7,743
Software Subtotal:	1,549	1,549	1,549	1,549	1,549	1,549	9,291
Infrastructure:		,	,	,, ,	,	,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,	-, -
Infrastructure Subtotal							
Training:							
Training Subtotal:							
Other:							
Other Subtotal:							
Costs Total:	123,774	26,670	27,047	27,429	27,817	28,211	260,947

Date: 02/02/2022

Return on Investment Analysis

Assumptions

Date	Assumption Description
28-Feb-22	Assuming the hourly rate for the staff cost avoidance is \$73/hour (including salary and fringes)
28-Feb-22	Assuming the purchase of an additional Salesforce sandbox would be \$13,734 per year, based on quote 30506321 received from Carahsoft
	Pricing for OwnBackup is from the State of MI Salesforce contract (https://www.michigan.gov/dtmb/-/media/Project/Websites/dtmb/Procurement/Contracts/MiDEAL-Media/001/071b6600108.pdf); \$37.81/user annually plus sandbox seeding at \$24.13/user annually. Total is \$61.94/user. Assuming 25 Econ Dev users. This is one option for a backup solution, but may not be the final
	selected option.

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